

Medical Inventory Management

User Story:

The Medical Inventory Management System is a comprehensive Salesforce application designed to streamline and manage various operational aspects of the medical inventory. It can efficiently maintain supplier details, manage purchase orders, track product details and transactions, and monitor expiry dates of products, thereby improving operational efficiency, data accuracy, and reporting capabilities.

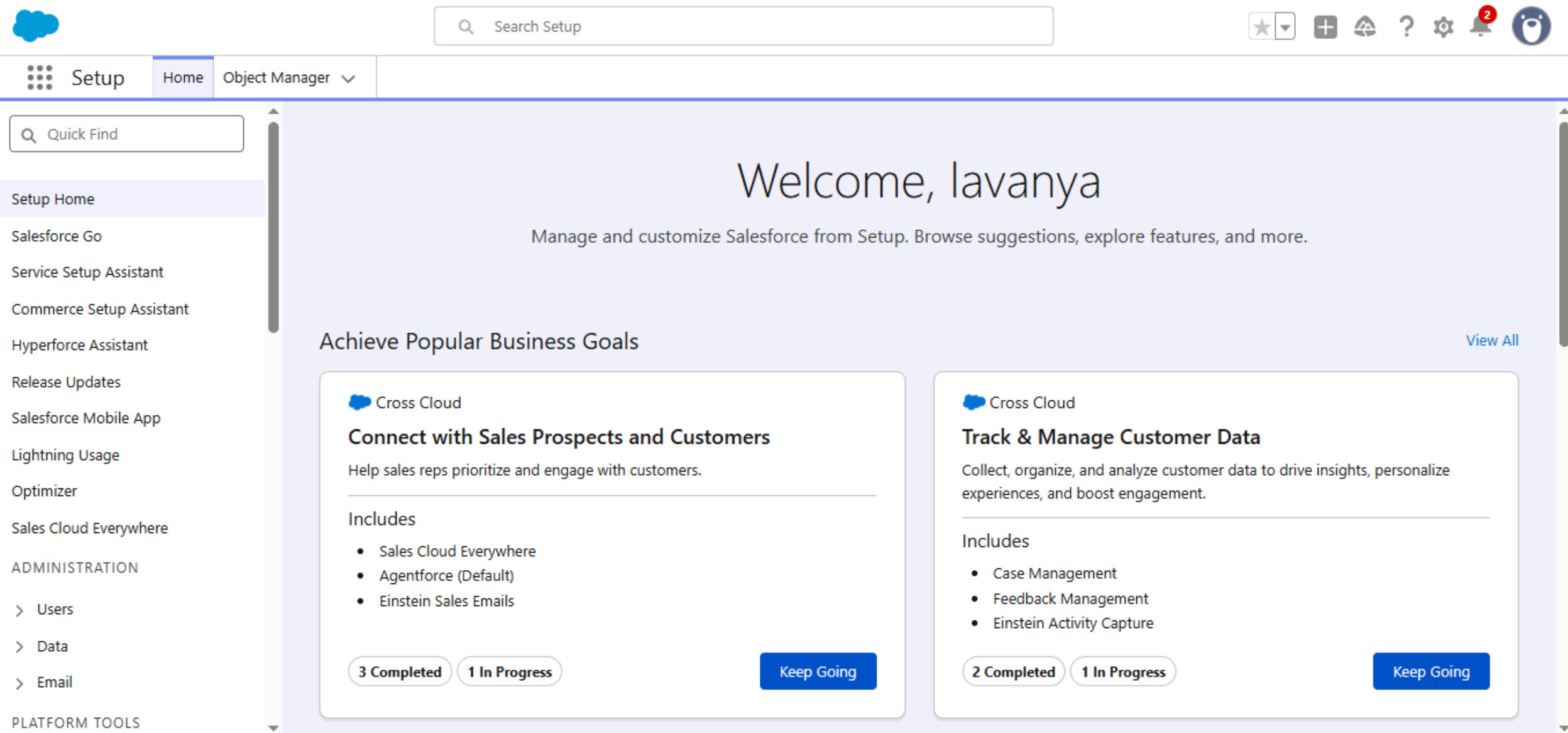
Project Overview :

This project is a comprehensive Salesforce application to streamline and manage various operational aspects of medical inventory. The system aims to efficiently maintain supplier details, manage purchase orders, track product details and transactions, and monitor the expiry dates of products. Maintain detailed records of suppliers, including contact information. Catalog product information, including descriptions, stock levels. Monitor and track product expiry dates to avoid using expired items. Comprehensive reports to track supplier performance, and purchase orders.

Project Flow:

- Milestone 1 : Creation of developer account
- Milestone 2 : Object Creation
- Milestone 3 : Tabs
- Milestone 4 : The Lightning App
- Milestone 5 : Fields
- Milestone 6 : Updating of Page Layouts
- Milestone 7 : Compact Layouts
- Milestone 8 : Validation rules
- Milestone 9 : Profiles
- Milestone 10 : Roles
- Milestone 11 : Users
- Milestone 12 : Permission Sets
- Milestone 13 : Flows
- Milestone 14 : Triggers
- Milestone 15 : Reports
- Milestone 16 : Dashboards

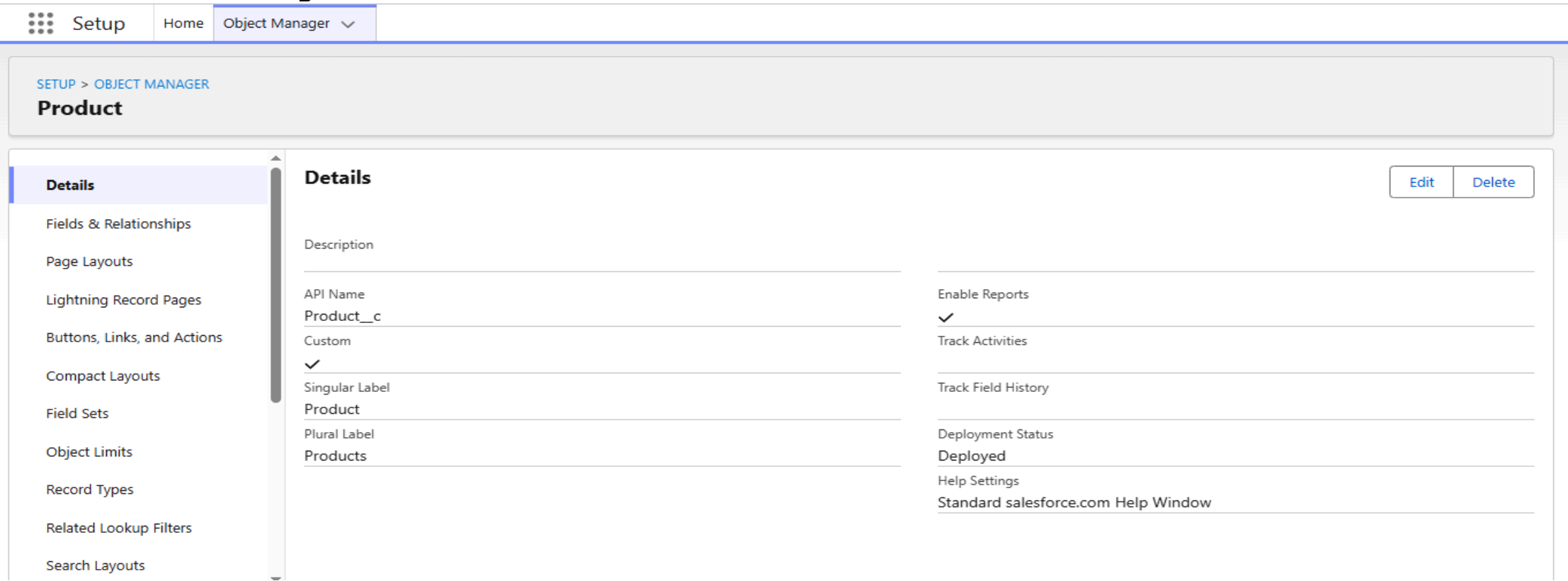
Step 1: Creating Developer Account



Step 2- Objects

In Salesforce, objects are database tables that allow you to store data specific to your organization.
Create Product, Purchase Order, Order Item, Inventory Transaction and Supplier objects.

1.Product object



2.Purchase order object

SetupHomeObject Manager

SETUP > OBJECT MANAGER

Purchase Order

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersSearch Layouts

Details

EditDelete

Description

API NamePurchase_Order__c

Custom✓

Singular LabelPurchase Order

Plural LabelPurchase Orders

Enable Reports✓

Track Activities

Track Field History

Deployment StatusDeployed

Help SettingsStandard salesforce.com Help Window

3.Order Item object

SetupHomeObject Manager

SETUP > OBJECT MANAGER

Order Item

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersSearch Layouts

Details

EditDelete

Description

API NameOrder_Item__c

Custom✓

Singular LabelOrder Item

Plural LabelOrder Items

Enable Reports✓

Track Activities

Track Field History

Deployment StatusDeployed

Help SettingsStandard salesforce.com Help Window

4.Inventory Transcation

SetupHomeObject Manager

SETUP > OBJECT MANAGER

Inventory Transaction

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersSearch Layouts

Details

EditDelete

Description

API NameInventory_Transaction__c

Custom✓

Singular LabelInventory Transaction

Plural LabelInventory Transactions

Enable Reports✓

Track Activities

Track Field History

Deployment StatusDeployed

Help SettingsStandard salesforce.com Help Window

5.Supplier

SETUP > OBJECT MANAGER

Supplier

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Details

Description

API Name

Supplier__c

Custom

✓

Singular Label

Supplier

Plural Label

Suppliers

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

EditDelete

Step 3- Tabs

In Salesforce, tabs are used to make the data stored in objects accessible to users through the user interface. Tabs are a fundamental part of the Salesforce interface, providing a way to navigate to different objects and records.

SETUP

Tabs

Custom Tabs

Help for this Page ?

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

NewWhat Is This?

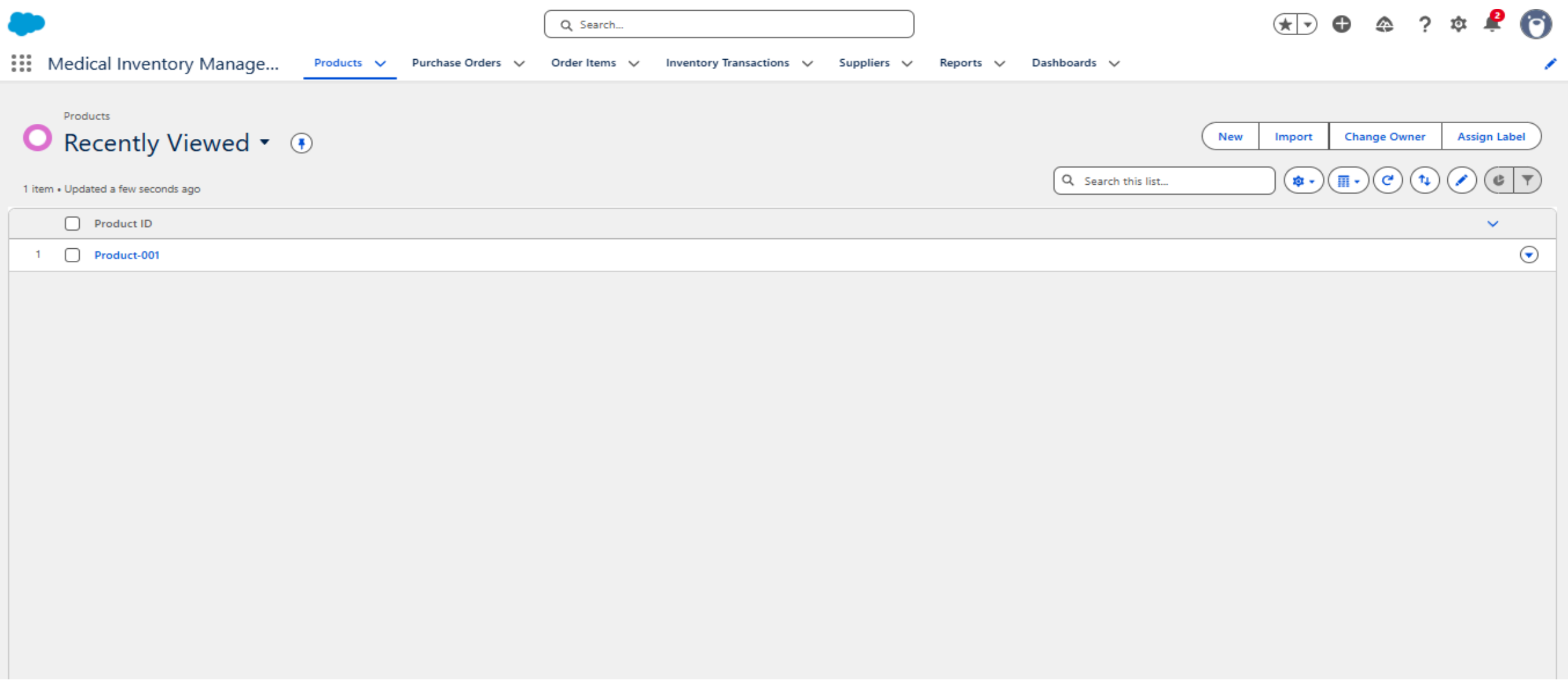
Action	Label	Tab Style	Description
Edit Del	Inventory Transactions	Heart	
Edit Del	Order Items	Jewel	
Edit Del	Products	Circle	
Edit Del	Purchase Orders	Dice	
Edit Del	Suppliers	Bridge	

Web Tabs

NewWhat Is This?

Step 4- The Lightning App

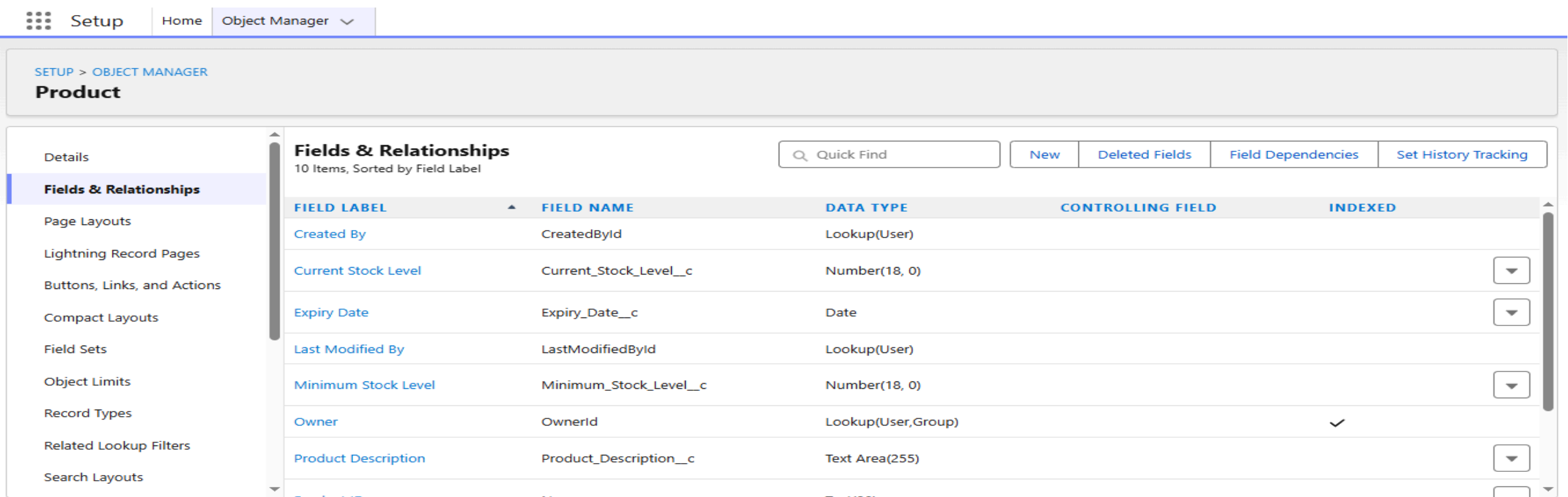
A Lightning App in Salesforce is a collection of items that work together to serve a particular function for the end-users. These items can include standard and custom objects, tabs, utilities, and other productivity tools. Lightning Apps are designed to provide a more intuitive and efficient user experience compared to traditional Salesforce apps.



Step 5- Fields

Create a field for each object there are product, purchase order, inventory transaction, order Item and supplier object.

1.product fields



2.Purchase order fields

SetupHomeObject Manager

SETUP > OBJECT MANAGER

Purchase Order

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersSearch Layouts

Fields & Relationships

10 Items, Sorted by Field Label

Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Actual Delivery Date	Actual_Delivery_Date__c	Date		
Created By	CreatedById	Lookup(User)		
Expected Delivery Date	Expected_Delivery_Date__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Order Count	Order_Count__c	Roll-Up Summary (COUNT Order Item)		
Order Date	Order_Date__c	Date		
Owner	OwnerId	Lookup(User,Group)		

3.Order Item fields

SetupHomeObject Manager

SETUP > OBJECT MANAGER

Order Item

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersSearch Layouts

Fields & Relationships

9 Items, Sorted by Field Label

Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Order Item ID	Name	Text(80)		
Product ID	Product_ID__c	Lookup(Product)		
Purchase Order ID	Purchase_Order_ID__c	Master-Detail(Purchase Order)		
Quantity Ordered	Quantity_Ordered__c	Number(18, 0)		

4.Inventory Transaction fields

SetupHomeObject Manager

SETUP > OBJECT MANAGER

Inventory Transaction

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersSearch Layouts

Fields & Relationships

8 Items, Sorted by Field Label

Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		
Purchase Order ID	Purchase_Order_ID__c	Lookup(Purchase Order)		
Total Order Cost	Total_Order_Cost__c	Formula (Currency)		
Transaction Date	Transaction_Date__c	Date		
Transaction ID	Name	Text(80)		

5.Supplier fields

SetupHomeObject Manager

SETUP > OBJECT MANAGER
Supplier

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersSearch Layouts

Fields & Relationships

9 Items, Sorted by Field Label

FIELD LABELFIELD NAMEDATA TYPECONTROLLING FIELDINDEXED

AddressAddress_cText Area(255)

Contact PersonContact_Person_cText(80)

Created ByCreatedByIdLookup(User)

EmailEmail_cEmail

Last Modified ByLastModifiedByIdLookup(User)

OwnerOwnerIdLookup(User,Group)

Phone NumberPhone_Number_cPhone

Step 6 -Editing of Page Layouts

Page layouts in Salesforce are used to customize the organization, structure, and content of pages for viewing and editing records. They determine which fields, related lists, and custom links are visible to users, as well as the order and grouping of those elements.

1.A Page Layout in Product Object

SetupHomeObject Manager

SETUP > OBJECT MANAGER
Product

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersSearch Layouts

SaveQuick SavePreview As...CancelUndoRedoLayout Properties

FieldsButtonsQuick ActionsMobile & Lightning ActionsExpanded LookupsRelated ListsReport Charts

Quick FindField Name

SectionExpiry DateProduct Description

Blank SpaceLast Modified ByProduct ID

Created ByMinimum Stock LevelProduct Name

Current Stock LevelOwnerUnit Price

Information (Header visible on edit only)

Product IDSample Text

Product NameSample Text

Product DescriptionSample Text

Unit Price\$123.45

Current Stock Level6,800

Minimum Stock Level73,748

OwnerSample Text

System Information (Header visible on edit only)

Created BySample Text

Last Modified BySample Text

Custom Links (Header visible on edit only)

2.A Page Layout in Purchase order Object

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Purchase Order

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

SaveQuick SavePreview As...CancelUndoRedoLayout Properties

Fields

Buttons

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Report Charts

Quick Find

Field Name

Section

Blank Space

Actual Delivery Date

Created By

Expected Delivery...

Last Modified By

Order Count

Order Date

Owner

Purchase Order ID

Supplier ID

Total Order Cost

Custom Buttons

Information (Header visible on edit only)

★

●

Purchase Order ID

Sample Text

★

●

Supplier ID

Sample Text

★

●

Order Date

11/2/2025

★

●

Expected Delivery Date

11/2/2025

🔒

Actual Delivery Date

11/2/2025

🔒

Order Count

81,929

🔒

Total Order Cost

\$123.45

Owner

Sample Text

System Information (Header visible on edit only)

🔒

Created By

Sample Text

🔒

Last Modified By

Sample Text

Custom Links (Header visible on edit only)

3.A Page Layout in Order Item Object

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Order Item

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

SaveQuick SavePreview As...CancelUndoRedoLayout Properties

Fields

Buttons

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Report Charts

Quick Find

Field Name

Section

Blank Space

Amount

Created By

Last Modified By

Order Item ID

Product ID

Purchase Order ID

Quantity Ordered

Quantity Received

Unit Price

Standard Buttons

EditDeleteCloneChange OwnerChange Record TypePrintable ViewEdit Labels

Custom Buttons

Order Item Detail

Information (Header visible on edit only)

★

●

Order Item ID

Sample Text

🔒

Amount

\$123.45

★

●

Purchase Order ID

Sample Text

Product details

Product ID

Sample Text

Quantity Ordered

87,335

🔒

Unit Price

\$123.45

Quantity Received

86,301

System Information (Header visible on edit only)

🔒

Created By

Sample Text

🔒

Last Modified By

Sample Text

Custom Links (Header visible on edit only)

4.A Page Layout in Inventory Transaction Object

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Inventory Transaction

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

SaveQuick SavePreview As...CancelUndoRedoLayout Properties

Fields

Buttons

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Report Charts

Quick Find

Field Name

Section

Blank Space

Created By

Last Modified By

Owner

Purchase Order ID

Total Order Cost

Transaction ID

Transaction Type

Transaction Date

Information (Header visible on edit only)

★

●

Transaction ID

Sample Text

●

Purchase Order ID

Sample Text

●

Transaction Type

Sample Text

●

Transaction Date

11/2/2025

🔒

Total Order Cost

\$123.45

Owner

Sample Text

System Information (Header visible on edit only)

🔒

Created By

Sample Text

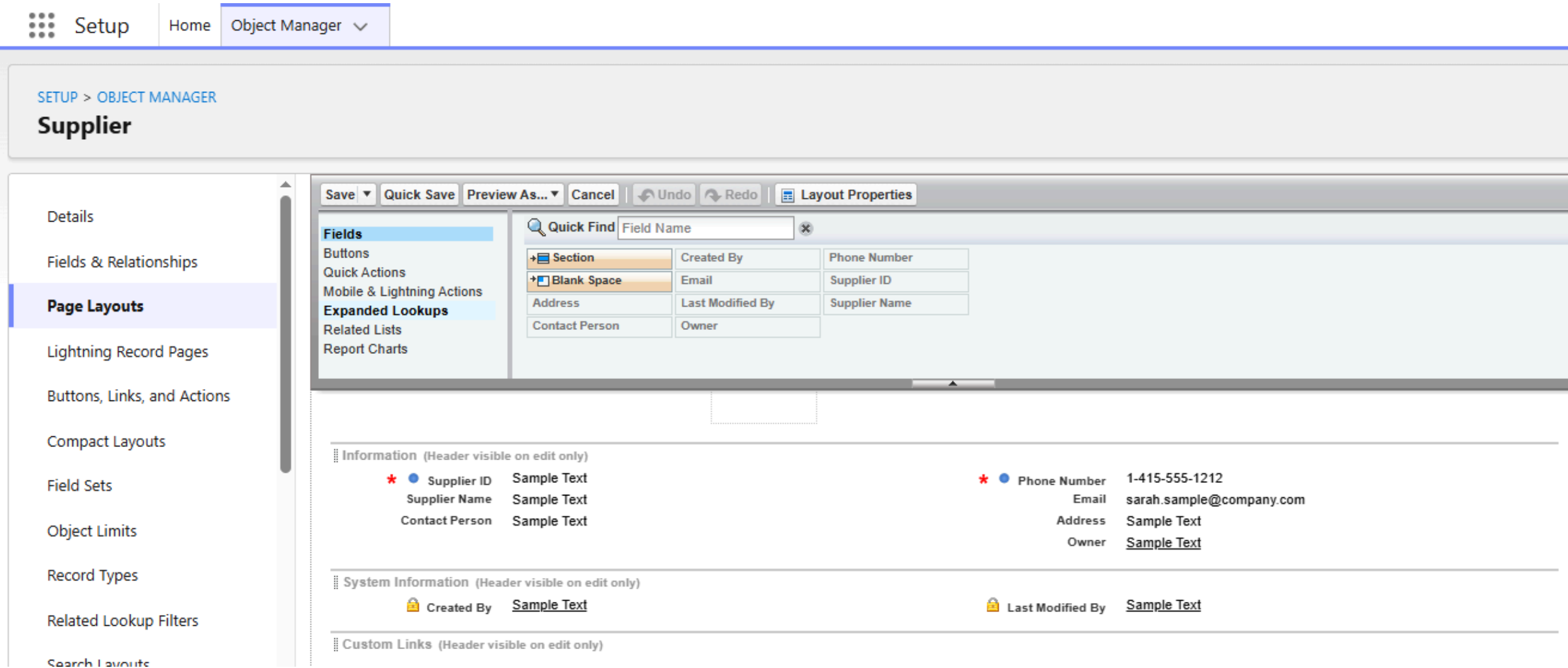
🔒

Last Modified By

Sample Text

Custom Links (Header visible on edit only)

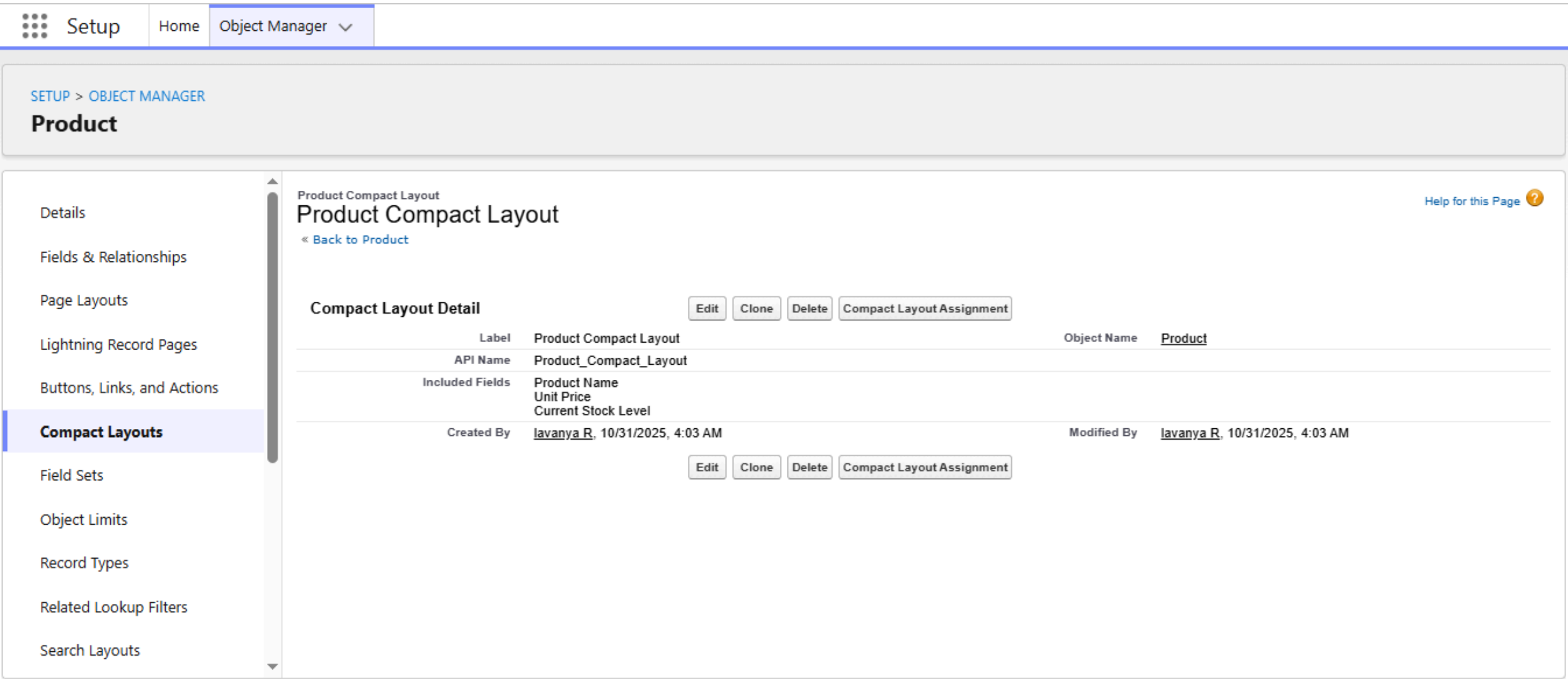
5.A Page Layout in Supplier Object



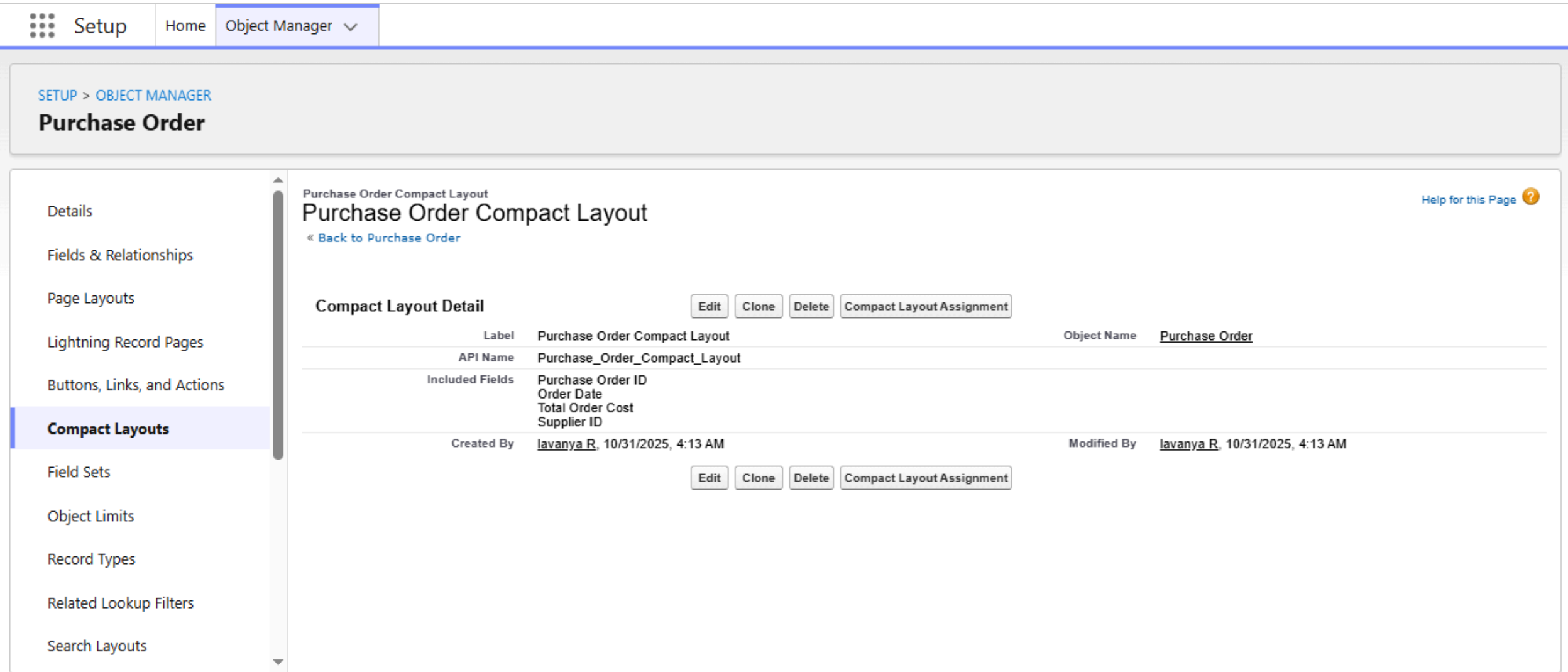
Step 7 - Compact Layouts

Compact layouts display a record’s key fields at a glance, providing important information quickly without needing to open the record.

1: To create a Compact Layout to a Product Object



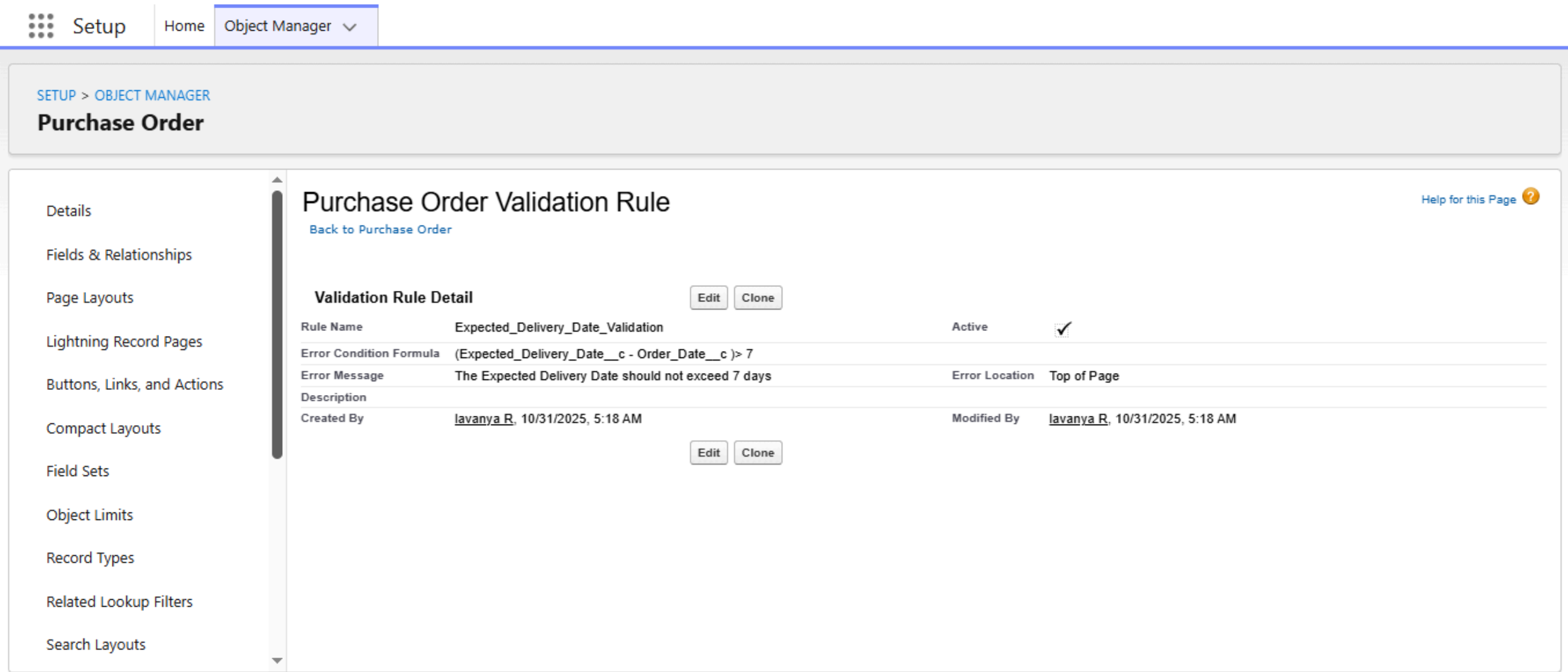
2: To create a Compact Layout to a Purchase Order Object



Step 8 - Validation Rules

Validation rules in Salesforce are used to ensure data integrity by preventing users from saving invalid data in records. They consist of a formula or expression that evaluates the data in one or more fields and return a value of true or false. When the rule's criteria are met (i.e., the expression evaluates to true), an error message is displayed, and the user is prevented from saving the record until the issue is resolved.

1: To create an Expected Delivery Date Validation rule to a Employee Object



Step 9 - Profiles

Profiles in Salesforce are fundamental to the platform's security model, defining what users can do within the organization. Profiles control a user’s permissions to objects, fields, tabs, apps, and other settings. Each user in Salesforce must be assigned a profile, and the profile assigned to a user determines what they can see and do in the system.

1: To create an Inventory Manager Profile

Setup

Home

Object Manager

profil

Users

Profiles

Didn't find what you're looking for? Try using Global Search.

SETUP

Profiles

Profile

Inventory Manager

Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges [0]

 |

Enabled Apex Class Access [2]

 |

Enabled Visualforce Page Access [0]

 |

Enabled External Data Source Access [0]

 |

Enabled Named Credential Access [0]

 |

Enabled External Credential Principal Access [0]

 |

Enabled Custom Metadata Type Access [0]

 |

Enabled Custom Setting Definitions Access [0]

 |

Enabled Flow Access [0]

 |

Enabled Service Presence Status Access [0]

 |

Enabled Custom Permissions [0]

Profile Detail

Edit

Clone

Delete

View Users

Name	Inventory Manager		
User License	Salesforce	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	lavanya R. 10/31/2025, 5:50 AM		Modified By lavanya R. 10/31/2025, 5:55 AM

Page Layouts

Standard Object Layouts

Global	Global Layout [View Assignment]	Location Group Assignment	Location Group Assignment Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Macro	Macro Layout [View Assignment]
Home Page Layout	Home Page Default	Object Metadata	Object Metadata Layout

2: To create an Purchase Manager Profile

Setup

Home

Object Manager

profil

Users

Profiles

Didn't find what you're looking for? Try using Global Search.

SETUP

Profiles

Profile

Purchase Manager

Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges [0]

 |

Enabled Apex Class Access [2]

 |

Enabled Visualforce Page Access [0]

 |

Enabled External Data Source Access [0]

 |

Enabled Named Credential Access [0]

 |

Enabled External Credential Principal Access [0]

 |

Enabled Custom Metadata Type Access [0]

 |

Enabled Custom Setting Definitions Access [0]

 |

Enabled Flow Access [0]

 |

Enabled Service Presence Status Access [0]

 |

Enabled Custom Permissions [0]

Profile Detail

Edit

Clone

Delete

View Users

Name	Purchase Manager		
User License	Salesforce	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	lavanya R. 10/27/2025, 8:07 AM		Modified By lavanya R. 10/31/2025, 5:59 AM

Page Layouts

Standard Object Layouts

Global	Global Layout [View Assignment]	Location Group Assignment	Location Group Assignment Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Macro	Macro Layout [View Assignment]
Home Page Layout	Home Page Default	Object Metadata	Object Metadata Layout

Step 10 - Roles

Roles in Salesforce are used to control record-level access and define the hierarchy of an organization, determining the level of visibility and sharing of records among users. Roles work in conjunction with profiles to provide a robust security model. While profiles control what actions users can perform (object and field permissions), roles control which records users can see based on their position in the hierarchy.

1 : Create a Purchasing Manager Role.

SETUP

Roles

Role

Purchasing Manager

Help for this Page

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: Sudharsan engineering college » CEO » SVP, Sales & Marketing » Purchasing Manager
Siblings: VP, North American Sales, VP, Marketing, VP, International Sales, Inventory Manager

Users in Purchasing Manager Role [1]

Role Detail

Edit

Delete

Label	Purchasing Manager	Role Name	Purchasing_Manager
This role reports to	SVP, Sales & Marketing	Role Name as displayed on reports	
Modified By	Javanya R, 10/31/2025, 6:04 AM	Sharing Groups	Role, Role and Internal Subordinates
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases		

Users in Purchasing Manager Role

Assign Users to Role

New User

Users in Purchasing Manager Role Help

Action	Full Name	Alias	Username	Active
Edit	John PurchaseM	jpurc	john@purchasem12.com	<input checked="" type="checkbox"/>

2 : Create a Inventory Manager Role.

SETUP

Roles

Role

Inventory Manager

Help for this Page

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: Sudharsan engineering college » CEO » SVP, Sales & Marketing » Inventory Manager
Siblings: VP, North American Sales, VP, Marketing, VP, International Sales, Purchasing Manager

Users in Inventory Manager Role [0]

Role Detail

Edit

Delete

Label	Inventory Manager	Role Name	Inventory_Manager
This role reports to	SVP, Sales & Marketing	Role Name as displayed on reports	
Modified By	Javanya R, 10/31/2025, 6:04 AM	Sharing Groups	Role, Role and Internal Subordinates
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases		

Users in Inventory Manager Role

Assign Users to Role

New User

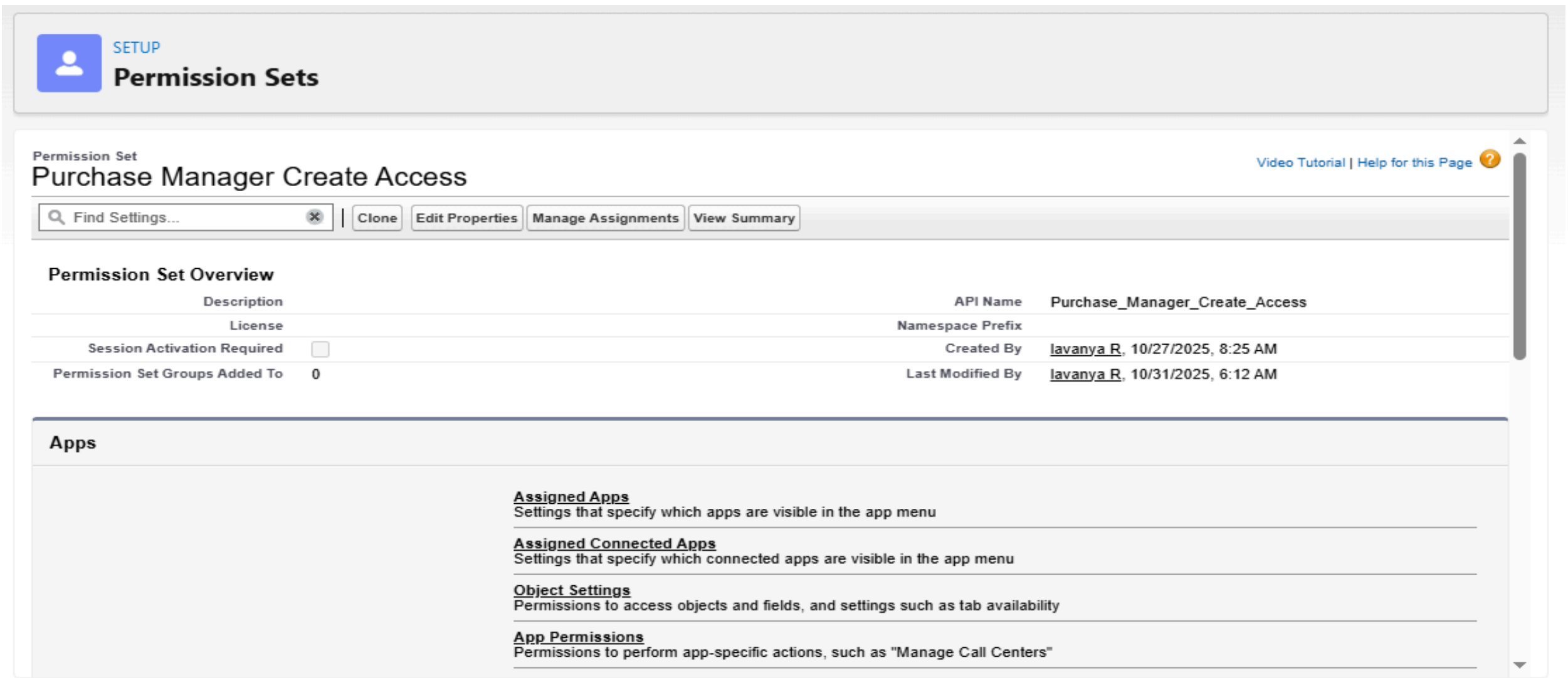
Users in Inventory Manager Role Help

No records to display

Step 12 - Permission Sets

Permission Sets in Salesforce are a powerful tool to extend user permissions beyond what is defined in their profiles. They allow administrators to grant additional access to various tools and functions without altering the user's profile. Permission sets are particularly useful for providing specialized permissions to specific users without the need to create multiple profiles.

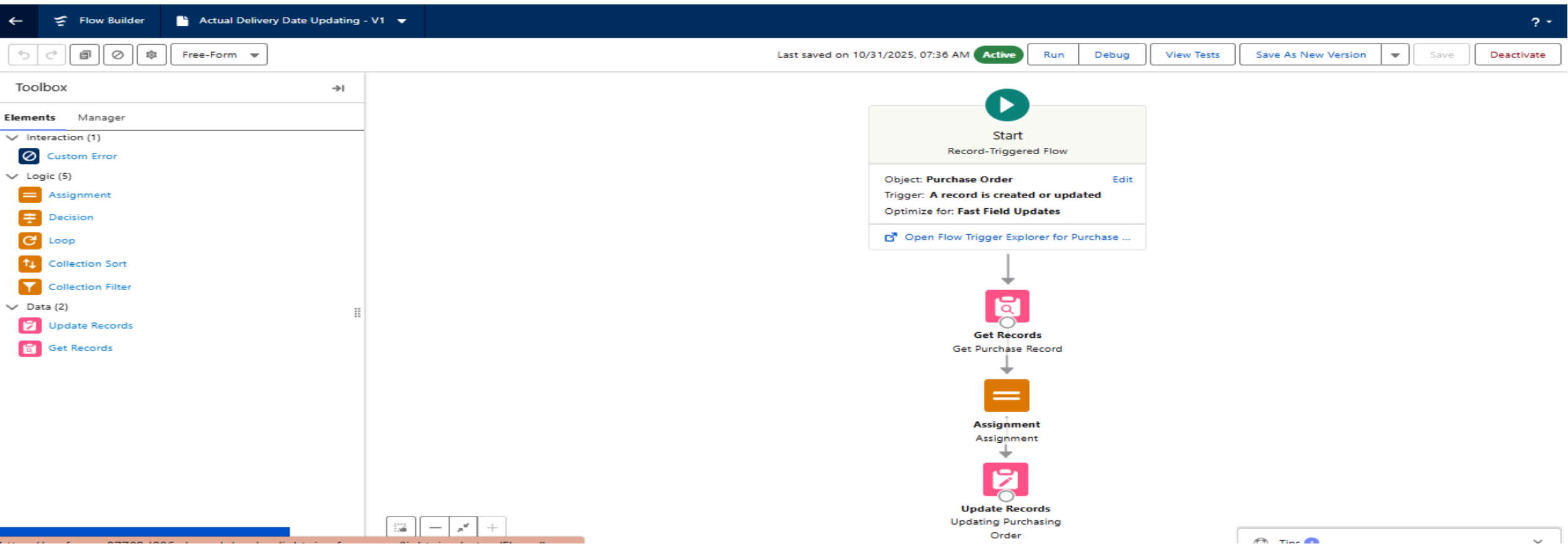
1 : Create a Permission Set.



Step 13 - Flows

Flows in Salesforce, part of the Lightning Flow product, are powerful automation tools that help you collect data and perform actions in your Salesforce environment. Flows can be used to automate business processes, guide users through tasks, and integrate with external systems. They are highly versatile and can be configured to meet a wide range of business requirements without the need for custom code.

1 : Create Flow to update the Actual Delivery Date.



Step 14 - Triggers

Triggers in Salesforce are pieces of Apex code that execute before or after specific data manipulation events on Salesforce records, such as insertions, updates, deletions, and undeletions. They are powerful tools for automating complex business logic and ensuring data integrity by enforcing custom validation rules and workflows that cannot be achieved through declarative tools alone.

1 : Create a Trigger to Calculate total amount on Order Item.

```
File Edit Debug Test Workspace Help < >
CalculateTotalAmountTrigger.apxt CalculateTotalAmountHandler.apxc
Code Coverage: None API Version: 65 Go To

1 trigger CalculateTotalAmountTrigger on Order_Item__c (after insert, after update, after delete, after undelete) {
2
3     // Call the handler class to handle the logic
4
5     CalculateTotalAmountHandler.calculateTotal(trigger.new, trigger.old, trigger.isInsert, trigger.isUpdate, trigger.isDelete, trigger.isUndelete);
6
7 }
```

Logs Tests Checkpoints Query Editor View State Progress Problems

User	Application	Operation	Time	Status	Read	Size
------	-------------	-----------	------	--------	------	------

Step 15 - Reports

Reports in Salesforce provide a powerful way to visualize and analyze data stored in your Salesforce organization. They allow users to create, customize, and share different types of reports based on data from standard and custom objects. Reports help organizations make informed decisions by providing insights into key metrics, trends, and performance indicators.

1: Create a Purchase Orders based on Suppliers(Summary) Report

Medical Inventory Manage...

Q Search...

Products

Purchase Orders

Order Items

Inventory Transactions

Suppliers

Reports

Dashb...

Report: Purchase Orders

Purchase Orders based on Suppliers

Total Records5

Total Order Count5

Total Total Order Cost\$144,950.00

Supplier ID	Purchase Order: Purchase Order ID	Order Count	Total Order Cost
Supplier 001 (4)	Purchase-0001 (3)	1	\$1,050.00
		1	\$35.00
		1	\$2,500.00
	Purchase-0002 (1)	1	\$2,450.00
Supplier-002 (1)	Purchase-0002 (1)	1	\$138,915.00
Total (5)		5	\$144,950.00

2: Create a Complete Purchase Details Report

Medical Inventory Manage...

Q Search...

Products

Purchase Orders

Order Items

Inventory Transactions

Suppliers

Reports

Dashboards

Report: Purchase Orders with Order Items and Product ID

Complete Purchase Details Report

Enable Field Editing

Q

Add Cha

Total Records5

Total Order Count5

Total Quantity Received1,232

Total Amount\$144,950.00

Supplier ID	Actual Delivery Date	Purchase Order: Purchase Order ID	Product ID: Product ID	Product ID: Product Name	Order Count	Quantity Received	Amount	
Supplier 001 (4)	11/3/2025 (3)	Purchase-0001 (3)	01tdL00000VvXS1	Amoxicillin	1	500	\$2,500.00	
			01tdL00000VvXdJ	Paracetamol	1	5	\$35.00	
			01tdL00000VvXdJ	Paracetamol	1	150	\$1,050.00	
		Subtotal			3	655	\$3,585.00	
	Subtotal				3	655	\$3,585.00	
	11/4/2025 (1)	Purchase-0002 (1)	01tdL00000VvXgX	Cough Syrup	1	10	\$2,450.00	
Supplier-002 (1)		Subtotal			1	10	\$2,450.00	
		Subtotal			1	10	\$2,450.00	
Subtotal					4	665	\$6,035.00	
Supplier-002 (1)	11/6/2025 (1)	Purchase-0002 (1)	01tdL00000VvXgX	Cough Syrup	1	567	\$138,915.00	
		Subtotal			1	567	\$138,915.00	
	Subtotal				1	567	\$138,915.00	
Subtotal					1	567	\$138,915.00	
Total (5)					5	1,232	\$144,950.00	

Step 16 - Dashboards

Dashboards in Salesforce are dynamic visual representations of key metrics and data from reports, providing a consolidated view of organizational performance and trends. They are powerful tools for monitoring real-time data, tracking progress towards goals, and gaining actionable insights at a glance. Dashboards consist of components such as charts, tables, metrics, and gauges that display data from underlying reports.

1: - Create Dashboard

